Open Preservation Foundation

OPF STRATEGY

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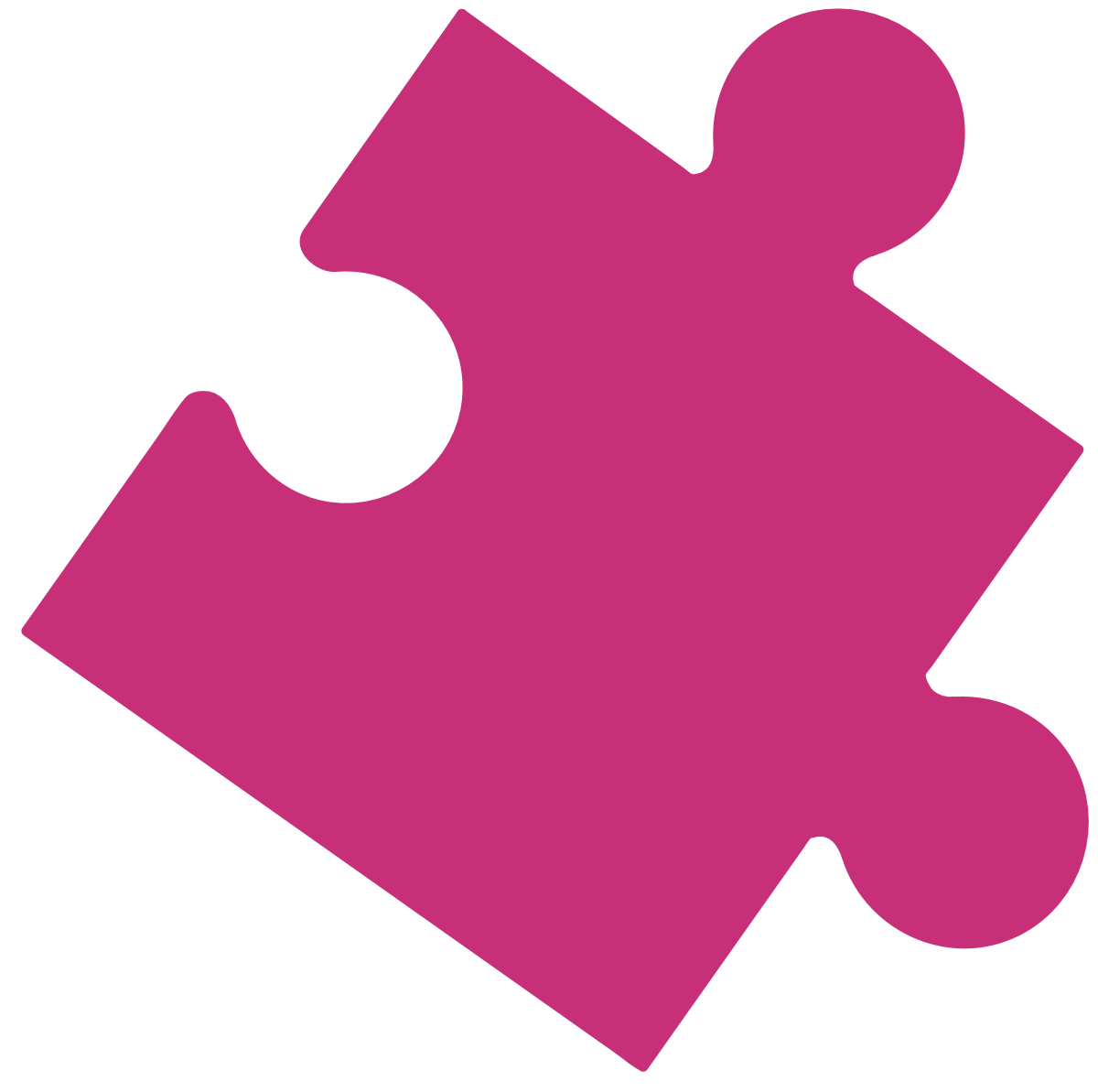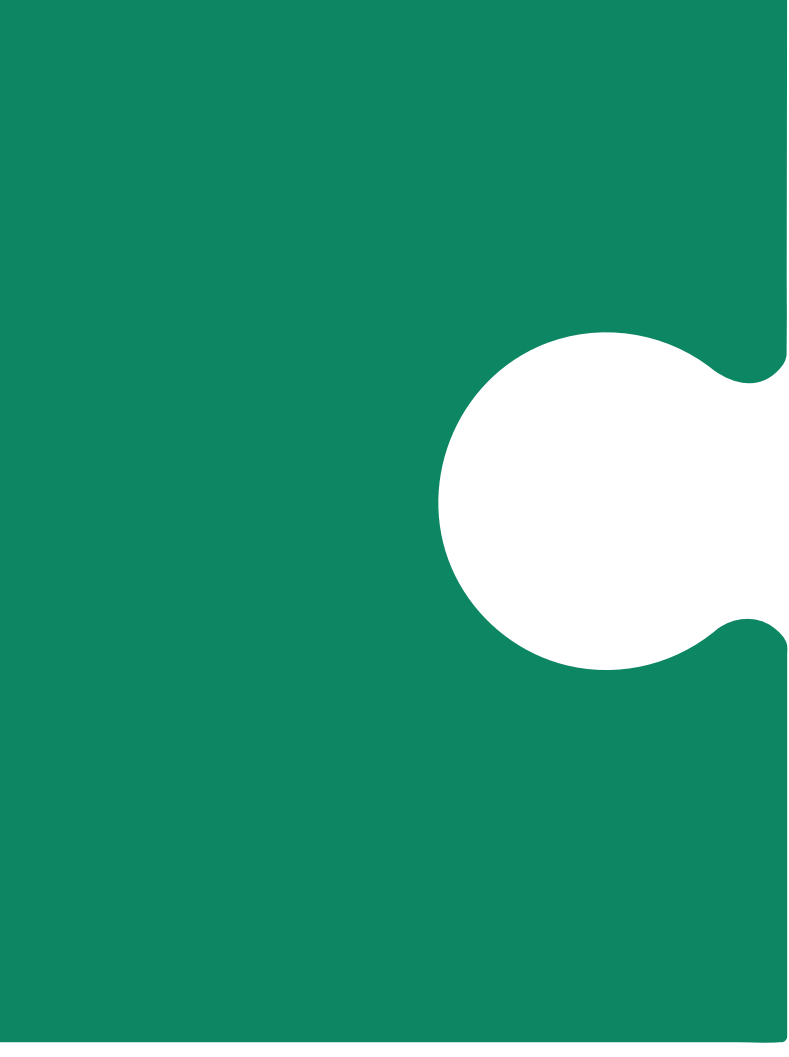
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Foreword

We are excited to share our organisation's latest strategic roadmap outlining our vision, goals, and initiatives for the coming years. We need to adapt, innovate, and align our efforts to meet the dynamic needs of our members and the wider preservation community. This strategic document serves us as a guiding compass, reflecting our ongoing commitment to good practice, sustainability, and positive impact. As we continue on this journey together, we invite all members of our organisation to actively engage, collaborate, and contribute to our growing community.

Julie Allen   Remco van Veenendaal
Executive Director   Chairman of the Board

Introduction

The Open Preservation Foundation (OPF) was established in 2010 to sustain the outcomes of an EU-funded research and development project called Planets. One of the first organisations of its kind, the Foundation's goal was to build on the project's collaborative, practical approach to advancing digital preservation.

In 2014 the OPF changed its name from the Open Planets Foundation to the Open Preservation Foundation to reflect its evolution and relevance within a growing field. The OPF operates as an independent, not-for-profit membership organisation, welcoming digital preservation practitioners from around the world to its open source community.

Today, collaboration and sustainability remain at the heart of what we do. Our small team serves our members and the community by providing practical digital preservation solutions and facilitating best practice that supports enduring access to digital collections.

This document establishes a strategic plan for the OPF from 2024 to 2027.

The strategic plan feeds the everyday activities of the Foundation. It guides decisions on the tasks and projects that the Foundation chooses to take on and measures the success of them.

Vision
Open sustainable digital preservation for all.

Mission
To make today's digital information accessible for future generations. The Open Preservation Foundation enables shared solutions for your open sustainable digital preservation needs. We lead a collaborative effort to create, maintain and develop a reference toolset and supporting resources.

These tools and resources enable organisations to evaluate, validate, document, mitigate risk and process digital content to be preserved in line with desired policies, standards and community good practice.

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OPF Core Values

Open

The OPF believes open source solutions provide long-term sustainability of software and knowledge. OPF reference toolset and documentation are made freely available under open licences.

The OPF believes that organisations across the globe can benefit from working collaboratively on digital preservation. We provide platforms, tools, knowledge and networks that enable collective development and improvement of shared standards and solutions to common digital preservation problems.

Many organisations face similar digital preservation challenges and sharing technology and knowledge can maximise benefits across the digital preservation community. OPF tools and knowledge address common issues, such as file format validation, that are faced by many organisations and provide a mechanism to focus mutual effort and resources into common solutions.

Open source projects need coordination in terms of a roadmap, prioritisation, a code of conduct for contribution, testing and overall project management. The OPF provides this coordination and if necessary will help to coach other contributors.

The way we operate, our openness about what we're doing, how we communicate with people and set priorities reflects this core value.

Sustainable

The OPF is a member-driven organisation that develops, delivers and maintains resources such as digital preservation tools (our reference toolset) that can be relied on by members and the community to meet their needs of long term sustainable solutions. By also hosting open source resources developed by others, and supporting and enabling Special Interest Groups, we ensure that these vital solutions and specialist information sets remain viable and available to all.

The OPF is primarily funded by membership, however, we may generate extra funding from projects and consultancy on open technology as appropriate to accelerate our strategic goals and ensure financial stability.

A board of directors, appointed from and by the members, controls the functioning of the OPF to ensure that the Foundation continues to deliver value to all members and the greater digital preservation community.

A small team of energetic, engaged staff work hard to ensure that members and the wider community find value in the OPF.

Member Led

Software and resource adoption into the OPF portfolio is determined by members' collective needs and requirements. Member input to any OPF activity plans as well as roadmaps for individual tools is critical to the success of the organisation in answering the community needs.

When you join the OPF, your priorities become our priorities. Our members are at the heart of what we do, and every decision we make is taken with their interests in mind. This is facilitated bi-annually by our OPF Advisory Group (OAG), and drives the Foundation's priorities and collaboration choices for successful initiatives. We set up and facilitate Special Interest Groups when a need is identified.

Historically, members have predominantly come from the principal domains of libraries, national and regional archives, research organisations and government agencies, with many originating in the EU. Over the years, that has expanded to other institutions and geographies. OPF membership is open to all and we encourage new members from outside these sectors.

Collaborative and Inclusive

The digital preservation community has a large number of collaborative bodies; some centred on fixed term project work, others with longer term constitutions and some that are ad-hoc and less formal. The OPF seeks to work collaboratively with all such organisations where practical and effective. We support and enable mutual understanding to align efforts to the best effect for members and the wider community.

OPF tools and knowledge are designed to assist and encourage organisations of all types and origins. Whether setting up digital preservation environments and systems for the first time or experienced users with large collections; our tools are suitable for libraries, archives, universities, museums, research institutes, commercial and privately owned entities.

Innovative

The Foundation will seek to participate in community research and development projects in line with the OPF strategy to advance tools, documentation, standards and related digital preservation goals. Such innovative projects may be funded by organisations including the EU, national governments or other national or international organisations, member organisations, like the OPF or another.

The OPF curates a diverse range of digital preservation topics. Our monthly webinars of invited experts from around the world provide a platform for learning and community knowledge exchange. Expert speakers share their insights, research and case studies on all things digital preservation.

Strategic Areas of Focus

Tools and Reference workflow

OPF's tools address common issues facing many organisations. Together, they form a reference toolset for digital preservation which can be adapted for use in different organisational workflows. For those who are just beginning their digital preservation journey, OPF defined a common workflow as a starting framework for digital preservation and mapped out where the tools fit within it.

The OPF reference workflow contains tools and resources that:
- are small, modular elements,
- embody an underlying open standard or specification,
- are authoritative in interpretation and enforcement of that standard,
- are open source to allow universal scrutiny and use,
- are identified and secured by a digital signature (platform applicable),
- are of production system quality (subject to implementation),
- can be used alone, or integrated in third-party systems,
- include test data that can be used to check third party tool compliance.

This workflow includes software, standard test data sets (or "test corpus"), other standards and good practice (including policies), and may rely on external components that have a robust support mechanism.

Monitoring and adding to the collection of tools in the reference toolset is principally driven by the needs of members and through understanding their processes and daily issues. OPF tools are used in a variety of configurations by various organisations, both centralised and distributed, and as such, the OPF will be mindful of organisational needs as well as technical needs. The goal is to enable users to easily adopt our products and incorporate them into their own workflow.

Understanding who is using our tools and how they are using them is a vital source of feedback. This helps to determine features to go into the development roadmap for a tool. Tool usage and feedback also helps the OPF prioritise between tools in terms of where resources are best focused.

Because of the open (anonymous) nature of the use of our software, historically we have only been able to measure downloads. OPF will investigate a set of key metrics for each tool to measure their use and effectiveness and publish them to encourage more input.

Delivering against a roadmap allows the OPF to demonstrate progress and delivery. With the help of tool champions, the member-led OPF Advisory Group (OAG) manages the roadmaps. OPF develops code, test strategies, test cases and test data for tools it supports and will supply project management to ensure successful delivery. The OPF will also actively encourage other developers to contribute to projects.

We plan to consolidate the number of different elements in our reference toolset and provide a single user interface for our products. Our approach is to create consistency across the toolset and provide a solid foundation on which to build new functionality. In the future, we will offer users a flexible choice of modules and make it more straightforward to integrate other tools.

By reducing the amount of redundant code and separating out old project infrastructure, we aim to minimise maintenance overheads while taking forward functional, sustainable products.
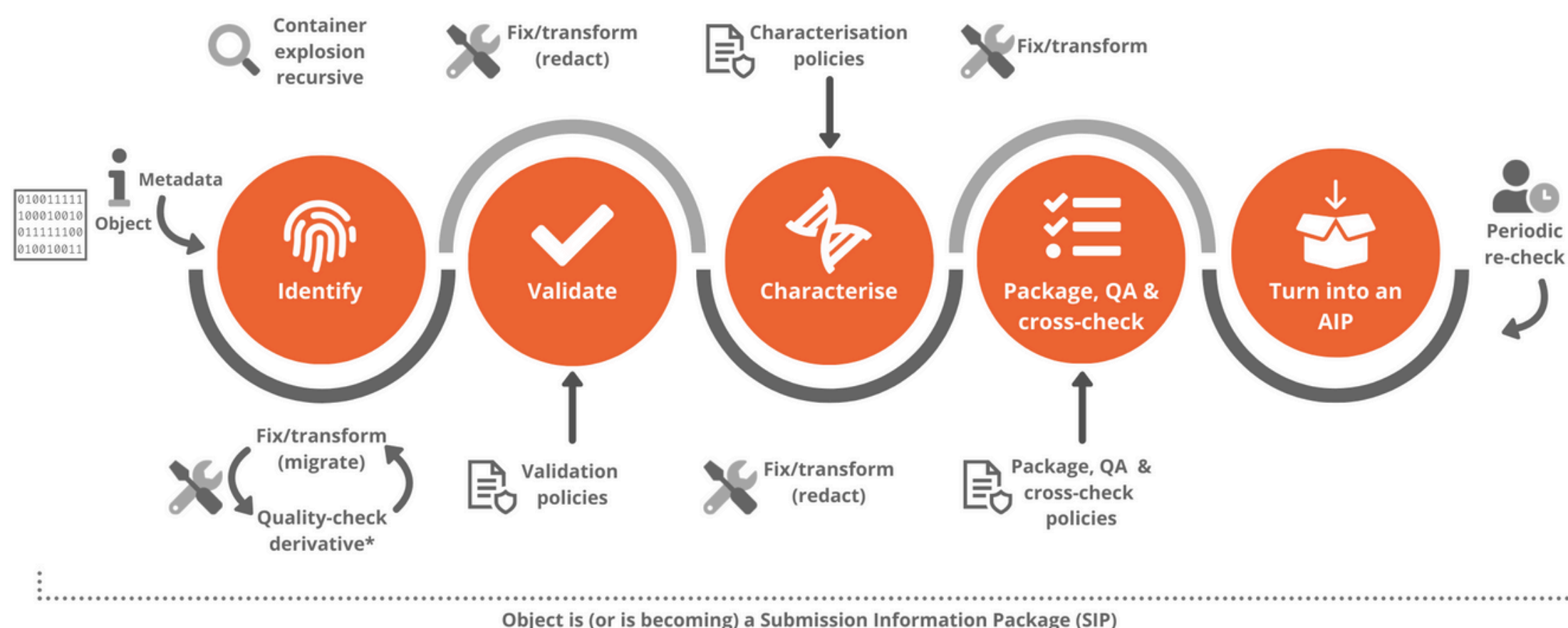
Knowledge sharing

The OPF runs a successful programme of webinars and interest groups to support members and the community to share good practice. The interest group topics are member-led, and the webinars showcase a variety of themes from expert speakers around the world. We will actively seek speakers in other time zones to appeal to a broader audience.

The OPF hosts a community blog platform on its website and a digital preservation knowledge base wiki as well as providing hosting for community resources such as COPTR and digipres Q&A. As the technology for these platforms changes, the OPF will respond to the community's needs by providing relevant and accessible ways to share knowledge and ensure their sustainability. In addition, a members-only resource section is planned to deliver greater value to our members.

Training and clinics

The use of OPF tools is facilitated by offering a range of training, which can be focused on a single tool or the entire reference workflow. This includes providing online resources, recorded sessions, effective documentation and live tuition and seminars. For members, in-house training, workshops and tailored sessions are offered. This will enable us to grow the user base of our tools even further, and through that, maximise the effectiveness of each tool with new testing, user cases and community support.

By offering clinics, the OPF provides more dedicated learning opportunities to members. These clinics are not limited to technical topics ("tech clinics"), but can also be about more general digital preservation topics, proofreading reports or communications in English ("comms clinics").

Feedback from training and clinics is a vital element that helps us to develop a deeper understanding of how our tools are used, what additional training we should be offering, and in what format. It also facilitates improvements in the product roadmap and our tool documentation.

Community engagement

The OPF engages with a community of developers and users that helps to identify requirements and deliver new software. This engagement happens through many different channels; from simply receiving emails and attending conferences or events featuring the OPF, to participating in webinars, advisory groups or special interest groups or ultimately delivering code contributions to open source projects.

The community began with our OPF members and has expanded to involve people and organisations throughout the global digital preservation effort. Not all community members are familiar with the principles and ideas of open source projects and software. The OPF aims to educate and explain what open source means and the benefits it brings.

Marketing OPF

The OPF will develop, maintain and deliver to a marketing plan that will be regularly updated and reviewed. This plan will focus on building brand awareness and ensuring that the digital preservation community knows what the OPF aims to achieve and will highlight our successes. The plan has four distinct but complementary goals;

- Build and enhance the OPF brand.
- Attract new members and demonstrate membership value to both current and potential members.
- Target increasing use of the OPF toolset and eliciting users' feedback on the tools.
- Position the OPF as a leader in the field of digital preservation, specifically to:
  - Present the OPF as the partner of choice for collaborations
  - Demonstrate OPF's influence in governmental thought and strategy development (e.g. European Commission and the USA)
  - Position the OPF as the partner for tools and sustainability in government funded projects.

Strategic Goals for the period 2024 - 2027

We are a small team with limited resources. Therefore, we have to make choices about what we can deliver. Once the strategic plan has been approved, an Annual Action Plan will be developed by the Executive Director for Board approval. These actions will support the following 3-year goals within our core vision and strategic areas of focus. It will also guide the staff and Board if priorities shift due to external forces.

Sustainable - Happy and engaged staff.

The OPF and the Board will work to ensure that all staff remain happy and engaged. A Board buddy system was introduced to give each staff member direct access to a Board member for coaching and mentoring. The staff manual has been updated and will be monitored to ensure that it remains in line with UK norms. The Board will conduct an annual salary review and ensure that general working conditions, training, mental health and technical equipment needs are met. Given that all staff work remotely, the Executive Director will arrange physical team meetings twice per year (pending budget approval).

Innovative, Tools and Reference workflow - Reference toolset enhancements.

Our published reference workflow has tools for determining and handling file formats in the digital preservation pre-ingest and ingest process (relating to the OAIS functional model). The OPF will continue to update this reference toolset based on input such as known issues, new uses, indeterminate errors etc., from tool champions and the OAG.

Roadmaps

The OPF will create roadmaps to address our tools processes. The roadmap process must be common across the toolset, with a common form and presentation of the roadmaps. Roadmap styles for development of documentation, standards and software will be developed. With the help of tool champions, the OAG (made up of member representatives), manages the roadmaps.

Member Led, Community Engagement, Collaborative and Inclusive, Sustainable - More members across more domains.

The OPF will actively seek more members in existing and new geographic and industry sectors who share the OPF Vision, Mission and Strategy. The first wave of the campaign will be targeted at Universities.

We will introduce a new member category; Individual Associate Member (IAM). The pilot for this will run for a maximum of three years, after which the Board will decide if it should continue. Applicants must show proof of being officially registered as a one-person SME or self-employed. IAM memberships will be approved by the Board, be valid for one year (renewable) and will not have voting rights.

The OPF will update and revise the statement of member benefits, and look to enhance the list of benefits. Specifically, there will be a review of benefits between the various membership categories (Value Calculator). Reviewed member benefits and Value Calculator will be published. OPF will develop an improved presentation of the member benefits as part of the member recruitment pack.

A members-only resource section is planned for the website.

We are introducing a 'Board Buddy' system whereby every member is assigned to a member of the Board. This facilitates Board members getting to know the general members better, helps in the recruitment of new Board members and gives members a direct voice to the Board on strategic matters.

The OPF will begin monitoring its performance on a continuing basis using the Net Promoter Score methodology.

Collaborative and Inclusive, Knowledge sharing, Training and clinics - Support best practice and user experience.

Our special interest groups are run on behalf of members and the wider community. The groups offer a forum for participants to share information and experiences around a specific topic and also provide feedback to the OPF on particular tools and digital preservation issues in general. The groups report progress, recommendations or findings at the OAG. It is our intention to encourage more groups to form, and work to make them more open and inclusive. For example, having non-technical user groups.

Expand our reach

For our webinars, we will actively seek at least 1 speaker per year in Asia and North America to appeal to a broader audience, cover different time zones and build brand awareness in those regions.

Open source project guidance

The OPF will create a set of guidance documents (code of conduct, contribution guidelines, software adoption process) building on and collaborating with existing players and documentation. This is in itself an open source project and contributions will be sought from members and the wider open source digital preservation development community to evolve existing guidance or create new if necessary.

Community engagement, Marketing - Host central community services.

The OPF will continue to host software and associated resources as well as community knowledge repositories. All such hosting will appropriately reflect the OPF brand and involvement. Community hosting is a key opportunity for marketing and forms part of the marketing plan. While some hosted items may be co-branded, the OPF brand should normally be dominant. The OPF will actively migrate existing hosted services to common URLs, domains and branding as feasible.

Share tool statistics

The download statistics of our tools will be published in our newsletters and shared at the OAG and AGM. An additional folder with marketing materials, options to register with us and invitations to become a member or donate, will be included in the download package.

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Open Preservation Foundation
11 Jamaica Street
Greenock, PA15 1XX

+44 (0) 113 526 6467

info@openpreservation.org

www.openpreservation.org | @openpreserve